

MHSA IT Workgroup Conference Call Meeting Minutes

January 26, 2006

3:00PM – 4:30PM

Meeting Minutes

Web Site: <http://www.dmh.ca.gov/MHSA/MHSAITWorkgroup.asp>

During the conference call, the following topics were discussed:

1. CSI reporting update

There was a good discussion on when counties need to start collecting and reporting on MHSA changes to CSI data. Counties had the following questions:

- a) Are counties expected to collect CSI data changes for all clients – MHSA or non-MHSA or just MHSA clients?

Answer: Counties should collect MHSA CSI fields for all clients.

- b) Is the “space” character allowed in the Trauma field?

Answer: Yes, the “space” character will be allowed in the Trauma field. You can enter one character code for Yes, No, Unknown or the “Space” character.

- c) Should the “Trauma” field exist at a client level or a service level?

Answer: The “Trauma” field exists at a service level, so as to keep it with the diagnosis fields.

- d) What’s DMH’s plan on getting the counties to test the CSI changes?

Answer: CSI MHSA testing will be closely monitored by DMH SDAS and IT staff on a county-by-county basis. For at least the first two months that counties send DMH CSI Submittal files containing MHSA information, those files will be processed in the CSI QA environment before being allowed to process in the CSI Production environment. Testing will be closely coordinated with the individual counties, and file naming conventions will be followed which will cause Test files to be routed to the QA environment.

- e) Will there be any training on new CSI fields before testing can begin?

Answer: CSI MHSA Requirements (including Record Layouts and Data Dictionary) are posted on ITWS and have been discussed in the MHSA IT Workgroup meetings. As counties begin system modifications to conform to the new MHSA

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CSI requirements, DMH SDAS and IT staff will work closely with the counties to ensure that they thoroughly understand the new requirements.

- f) Can DMH expand CCN number length to 10 characters?

Answer: Currently, CCN cannot be expanded to 10 bytes in the CSI system. Counties can store their 10 byte client identification number in one of the “county use” fields in the DCR system. Eventually, when the CSI functionality is deployed in the DCR system, the CCN number will be expanded to 10 bytes.

2. MHSA DCR system requirements

Orange County reviewed the MHSA DCR requirements document and provided feedback. Counties were interested in listening to the questions from Orange County and the DMH’s response. The DMH team discussed the questions and responses. These questions and responses are listed at the end of this document.

3. MHSA DCR system authorization

- a) User “Role” controls access to application screens
 - 3.a.1 A user’s Role will define what application screens the user has access to and what he can do on those screens (View/Query only or View/Query/Add/Update). In addition, whether a user has access to “Administrative Screens” or not will be controlled at a “Role” level.
 - 3.a.2 The DMH will define additional Roles after consultation with the workgroup.
 - 3.a.3 As a result of feedback from the counties, the DMH will allow assignment of multiple Roles to a user; however, the user will be logged-in as one Role at a time. The system will provide a mechanism for the user to change his Role to any one of the assigned Roles.
- b) Group controls access to FSP data.
 - 3.b.1 A user will be associated with one and only one group
 - 3.b.2 Users belonging to the same group will have access to same FSPs.
 - 3.b.3 Counties will define the groups and assign user to a group
 - 3.b.4 FSP can be assigned to multiple groups – this will be helpful when an FSP needs to be served by multiple groups.

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- 3.b.5 When a user enters an FSP record in the system, the record will automatically be assigned to the user's group.
- 3.b.6 A new sub-workgroup – system security sub-workgroup, was created to further refine system security mechanisms including defining groups and assignment of additional groups to the FSP records. The following members volunteered for the membership to this sub-workgroup:
 - 3.b.6.1 Cheri Silveira – Santa Clara
 - 3.b.6.2 Memo Keswick – Merced
 - 3.b.6.3 Nan Dame – San Francisco

4. MHSA DCR data model

The DMH team presented the MHSA DCR system logical and physical data model to the workgroup. The data model document is available on ITWS under:

“Technical Information->Design and Technical Documents”. All questions related to data model can be directed to ken.schallmo@dmh.ca.gov.

5. XML Schema Definition (XSD) sub-workgroup

The DMH team described a subset of an XML Schema Definition (XSD) for the MHSA DCR project. Currently, the DMH team has created four separate XSDs, one each for – Child, TAY, Adult and Older Adult. The XSDs contain the following information:

- a) Data groupings as per the logical data model
- b) Validations for data types
- c) Validations for data values
- d) Enumerations

The workgroup members did not have any feedback at this time.

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6. Next Steps

DMH described the following actions as next steps:

- Write a question and answer document on CSI issues and circulate to all workgroup members
- Conduct one on one technical sessions with the counties requesting additional information/help with the data model
- Conduct one on one technical sessions with the counties requesting additional help with the XSDs
- Discuss System Security with the system security sub-workgroup and create a security specifications document for circulation to all counties for approval
- The DMH team will put together an FAQs list and post it on the ITWS – the week of the February 6th
- Post the final requirements document on the ITWS system – Mid February
- Share the DCR system design with the counties – Mid March

Orange County Requirements Review Questions and Answers

Page 4, section 4.2.3 "Counties will approve provider data prior to the DMH accepting and processing the information" and Page 7, DCRF 20 -- It appears that any info input by "an authorized provider" will be put on hold and need to be reviewed and released by the County. Please clarify.

Section 4.2.3 and DCRF 21 both refer to the counties controlling the contract-provider input into the system. This is being done at the request of several counties in order to give the counties ownership and control of the data. Counties can opt out of this functionality.

Page 5, section 5.1, DCRF 01, item #3 -- we need to clarify what "Enrollment privileges" means as a function.

DMH is in the process of further defining this. It is actually on the agenda for the teleconference on 1/26/06. It is recognized the further clarification is needed.

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Please recall Carl's input from a previous conference call that 1-2 administrators in a County as large as Orange will not have the time to do repetitive tasks such as resetting passwords.

DMH currently has a task of reviewing the password resetting process and creating more user-friendly, automatic functionality (for instance, when enrolling, please enter a question and answer. Then, if you have forgotten your password, DMH will prompt you for an answer to your specific question – if answered correctly, DMH will send your password to the email address entered on your original enrollment – please note this is only an example not the actual solution).

Page 6-7, DCRF 16, items 1-3 -- we need to clarify which CCN number is considered the "master" number -- the one in the CSI file or the one in the DCR file?

The assumption is the CSI number from the CSI system is the "master" given that services cannot be provided to the FSP without a CSI number – therefore, an FSP must be issued a CSI number by the county at the time the partnership is created if the FSP does not have an existing CSI number.

Page 8, DCRF 26 -- we have the following questions:

1. During one of the previous conference calls it was mentioned that we would be able to input a record into the DCR without a CCN and that the record could be updated when the information was available. Will this still be the case considering that the CCN appears to be the primary key for the DCR system?

You are correct; the CCN is the primary key and must be provided. Recognizing that this may not work for all the counties, the DMH is currently reviewing other options for a primary ID field rather than the CCN.

2. If the CCN that is first input into the DCR turns out to be incorrect -- how can we modify the CCN?

DMH is currently defining how that will be accomplished – most likely it will be similar to CSI which has the ability to perform Key Changes

3. Will DMH be supplying a report of all DCR CCNs that do not match the CSI CCNs for correction purposes?

This has not been discussed. I will propose it to the technical team. Good suggestion – I should have caught it.

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Attendees List

DMH is appreciative of the active participation from the workgroup members. Members phoning in to the conference call included:

Dennis Kennelly – Alameda
Wayne Brandt – Butte
Steve Hahn Smith – Contra Costa
Erin Valdez – Glenn
Tamara – Glenn
Mike Miller – Fresno
Molly Tatety – Kern
John Campbell – LA
Juan Fermin – LA
Kathy Kipp – Marine
Memo Keswick – Merced
Sunday Berlanga – Monterey
Sandra Schmidt – Napa
Carl Funke – OC
Kathleen Murray – OC
Marko Anzar – OC
Kacey Vencill – Sacramento
Tracy Herbert – Sacramento
Tess Bugay – San Diego
Cheri Silveira – Santa Clara
Nan Dame – S.F.
Mark Morrison – Stanislaus
Patricia Ortega-Ruis – Stanislaus
Velinda Tackett – Stanislaus

Dawn Yin
Ken Fu – Echo
Laura San-Nicholas
Ruby Kadri – Pacific Clinics
Steven Gilbert – Caminar Software
Toi Gray – Turning Point Community Program

Sheila Kerr – DMH
Ken Schallmo – DMH
Brenda Golladay – DMH
Tracy Fujita – DMH
Dev Garg – DMH